

# *City of Las Vegas* *2014 Community* *Survey Findings*

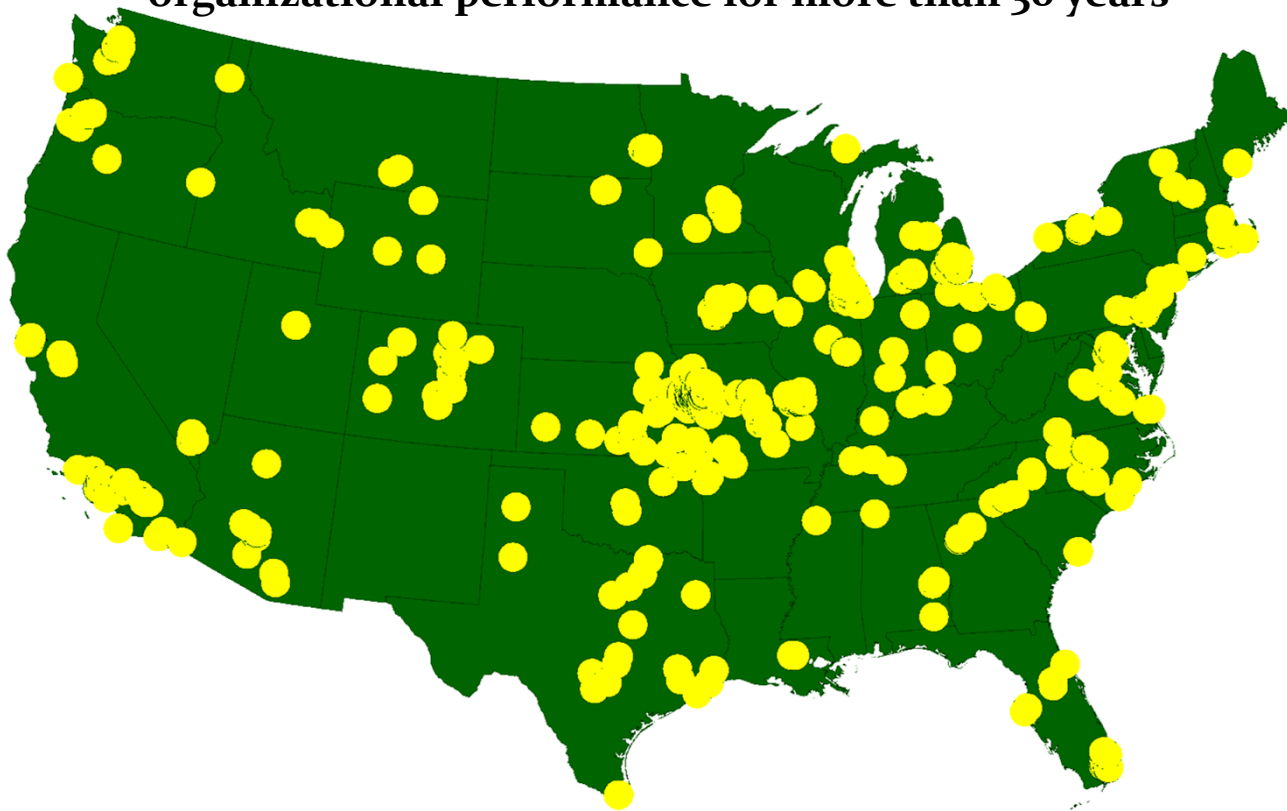
Presented by



April 2015

# **A National Leader in Market Research for Local Governmental Organizations**

...helping city and county governments gather and use survey data to enhance  
organizational performance for more than 30 years



**More than 1,850,000 Persons Surveyed Since 2006 for  
more than 700 cities in 49 States**

# Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary and Conclusions**
- **Questions**

# Purpose

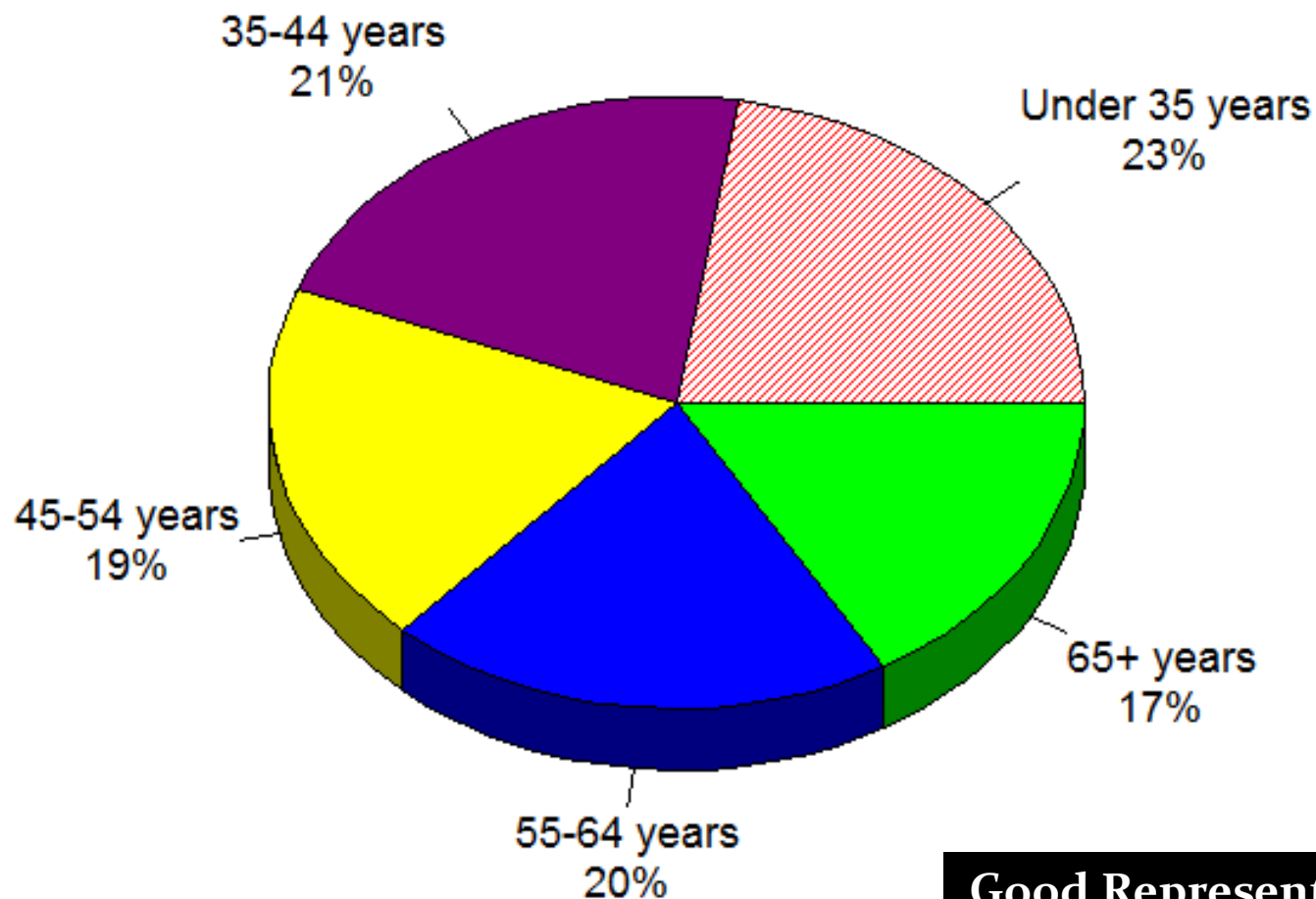
- **To objectively assess satisfaction with the delivery of major City services and quality of life**
- **To track the City's performance over time**
- **To help determine priorities for the City**
- **To compare City's performance with other large U.S. communities**

# Methodology

- **Survey Description**
  - ❑ six-page survey
- **Method of Administration**
  - ❑ by mail, phone and online to a randomly selected sample of households
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ Sample was stratified to ensure the completion of at least 150 surveys in each of City's six Council Wards
  - ❑ 922 completed surveys
- **Confidence level: 95<sup>0</sup>%**
- **Margin of error: +/- 3.2% overall**
- **All demographic groups were well-represented**

## Q28. Age of Respondents

by percentage of respondents (excluding not provided)

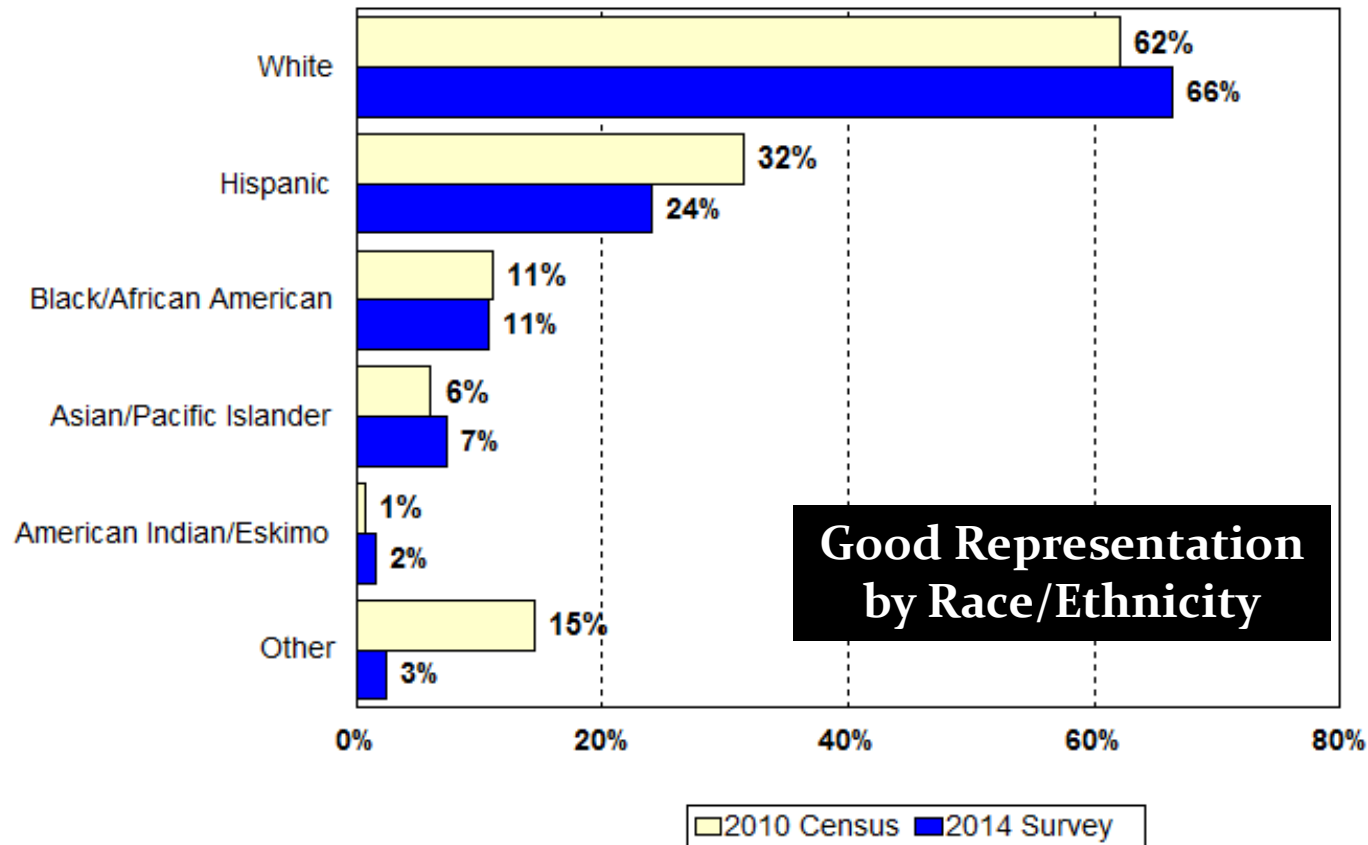


**Good Representation  
by Age**

Source: ETC Institute (2014 City of Las Vegas Community Survey)

## Q25. Race/Ethnicity of Respondents

by percentage of respondents (multiple responses allowed)

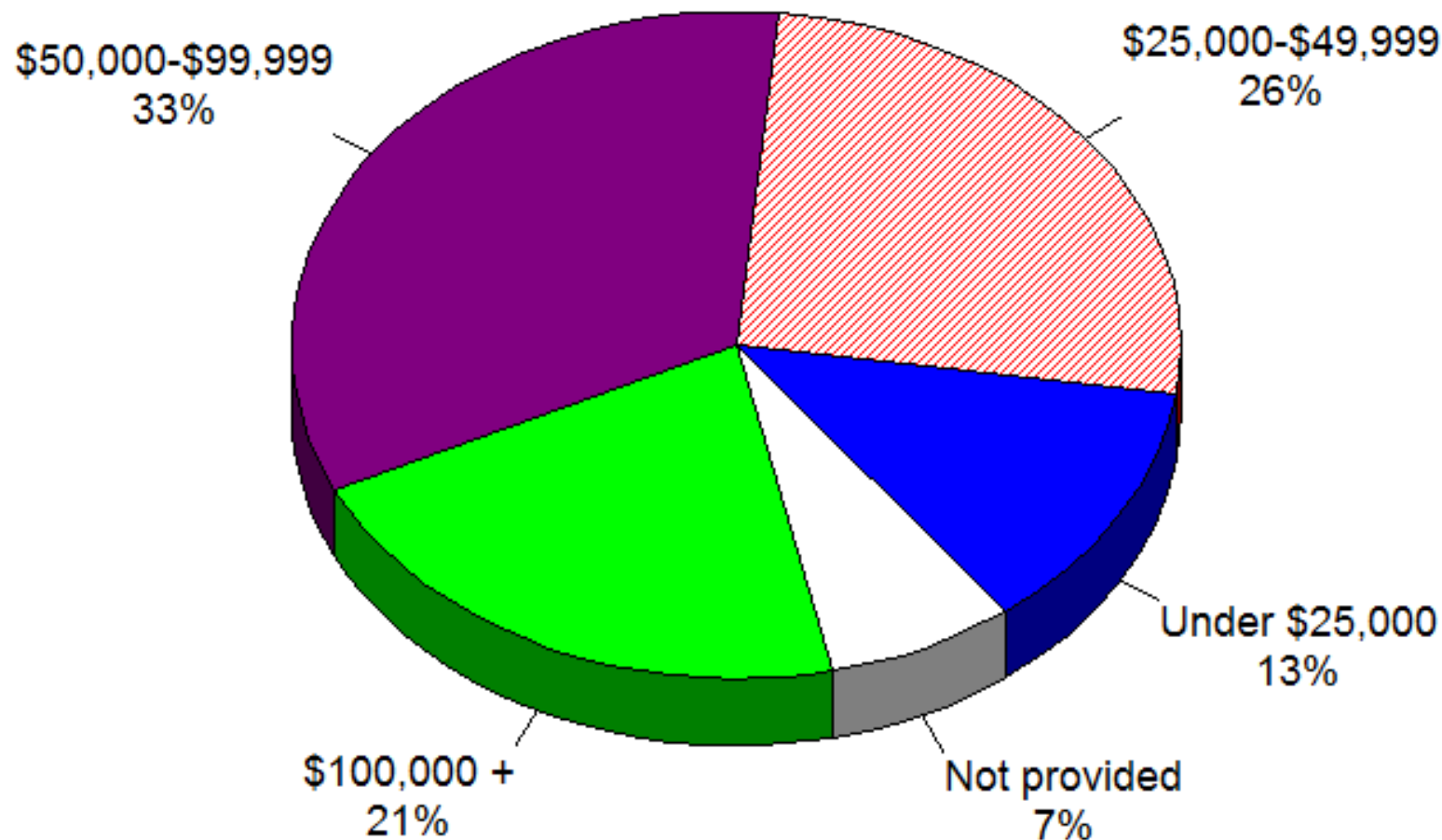


*Source: ETC Institute (2014 City of Las Vegas Community Survey)*

Note: The survey question about Hispanic origin was not asked as a separate question as it is done on the Census. As a result, some White respondents who are also Hispanic only selected "White", which is the reason the percentage of White respondents is a little higher than the Census and the percentage of Hispanic respondents is a little lower. Since some respondents identify themselves as being of more than one ethnicity, the total percentage will be greater than 100%.

## Q32. Total Annual Household Income of Respondents

by percentage of respondents



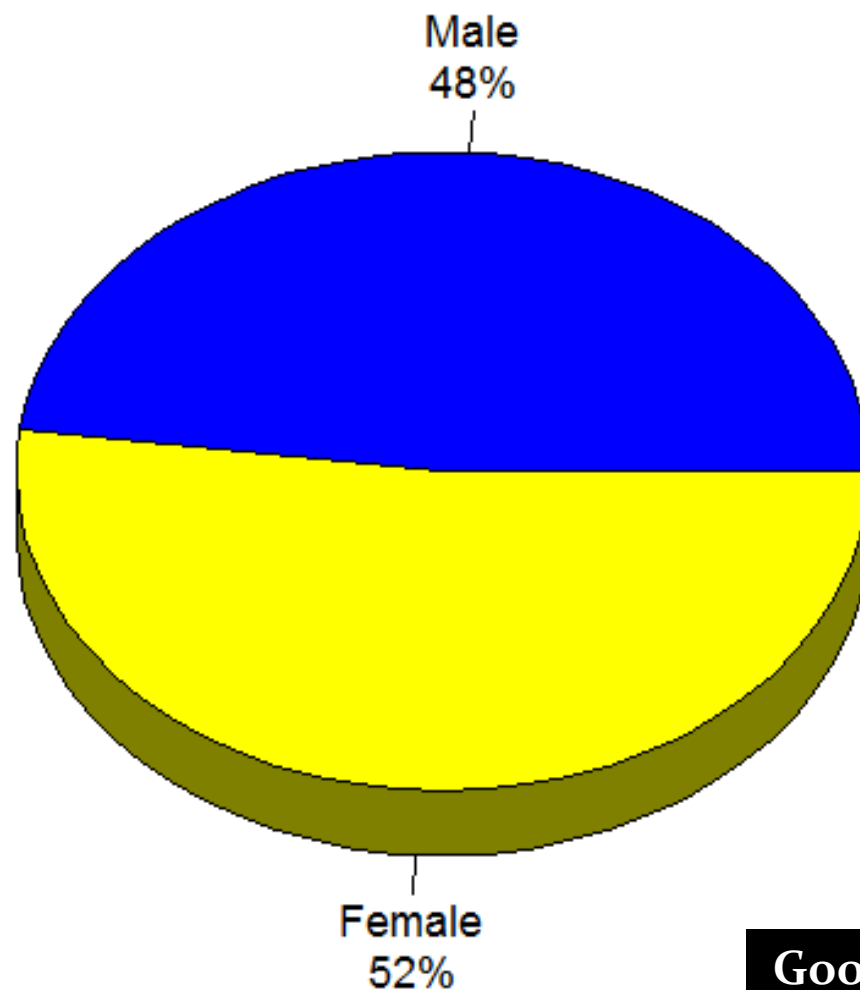
Source: ETC Institute (2014 City of Las Vegas Community Survey)

**Good Representation  
by Income**



## Q34. Gender of Respondents

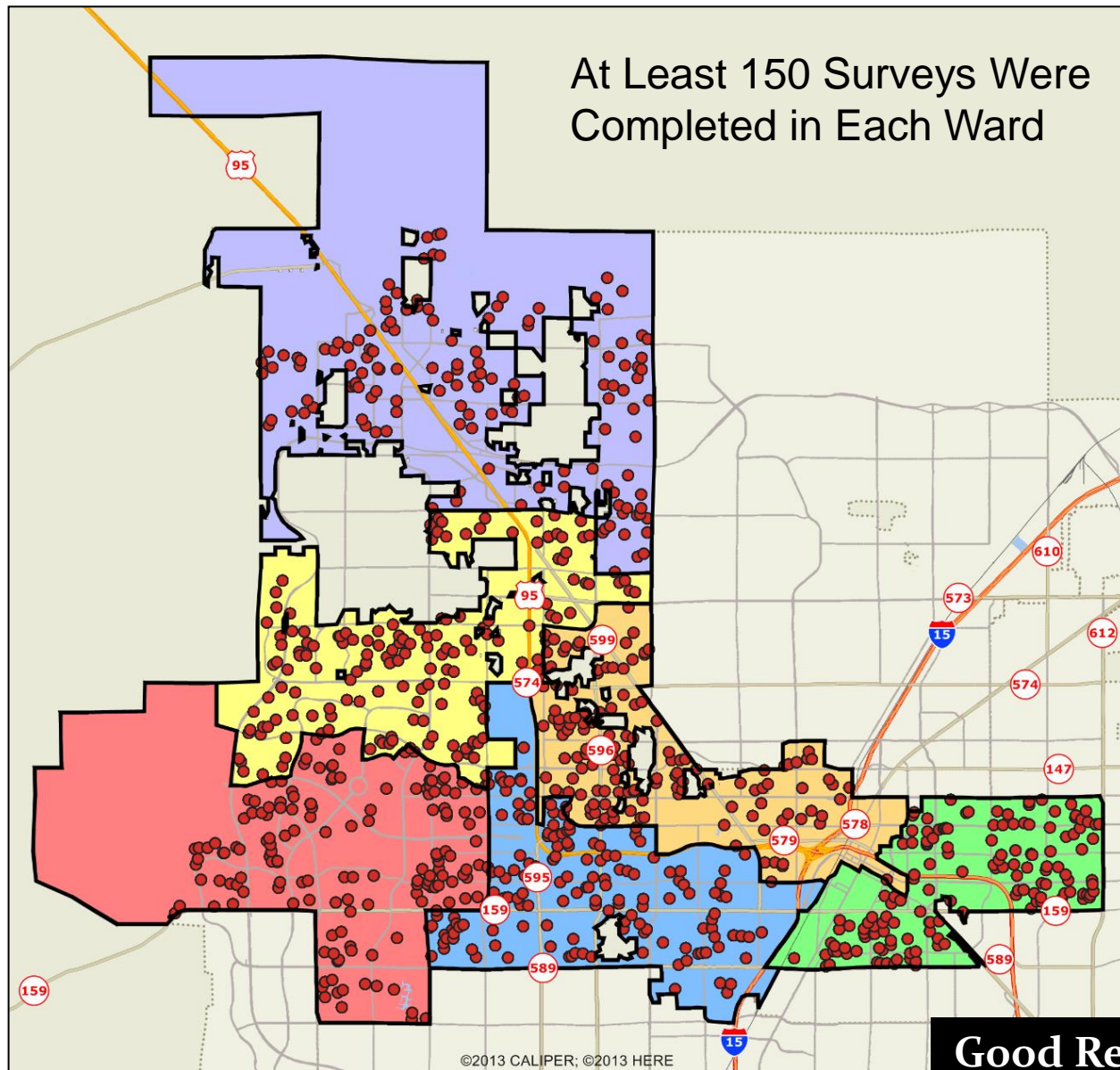
by percentage of respondents



**Good Representation  
by Gender**

*Source: ETC Institute (2014 City of Las Vegas Community Survey)*

# Location of Survey Respondents



2014 City of Las Vegas Community Survey

Good Representation  
by Location

# Bottom Line Up Front

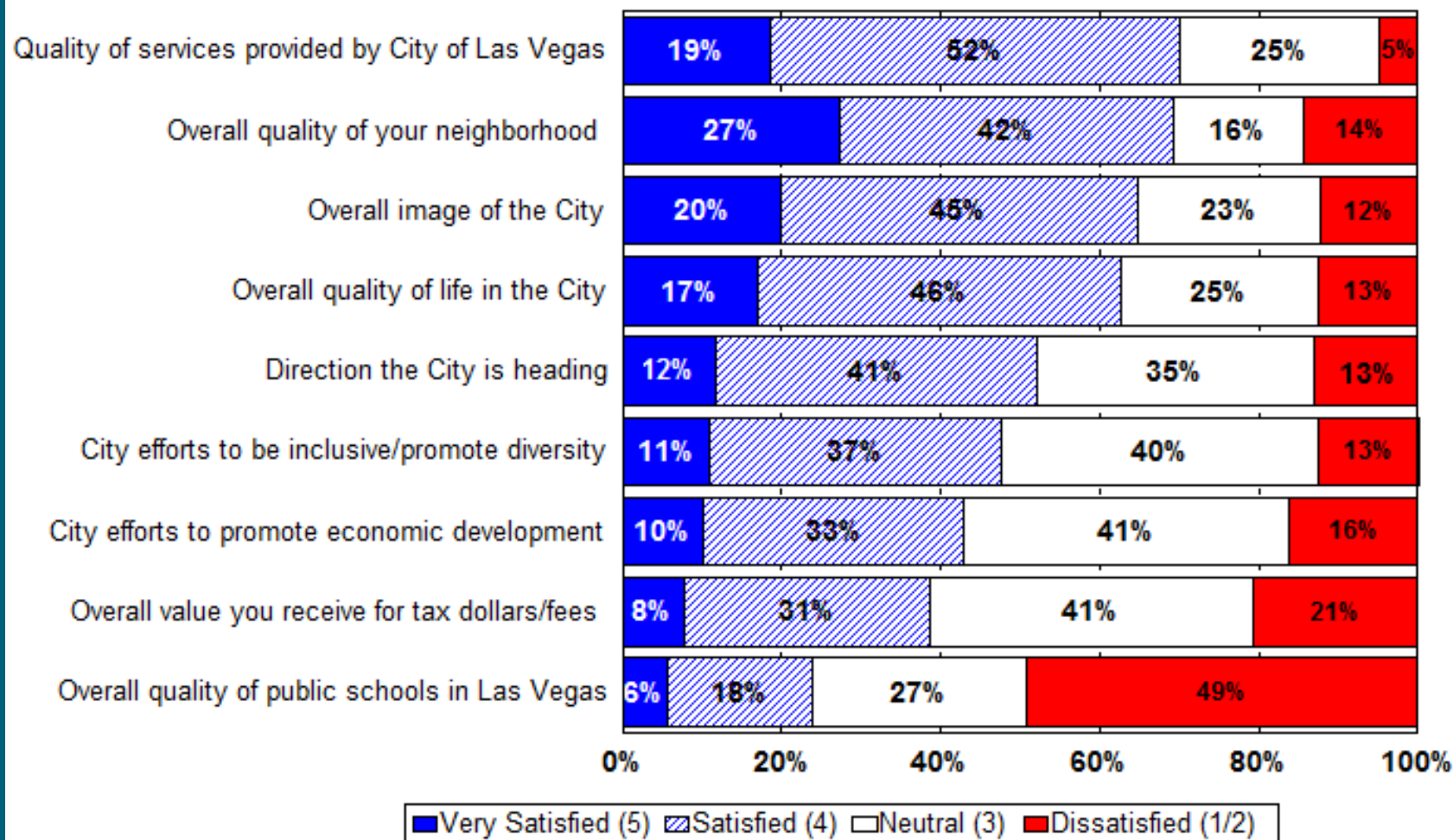
- Residents have a very positive perception of City Services
- The City is moving in the right direction
  - ✓ Satisfaction with city services improved or stayed the same in all major areas that were assessed
- Overall satisfaction with City services is high in most areas of the City
- Compared to other large cities, Las Vegas is setting the standard for service delivery in most areas
- To enhance overall satisfaction with City government, the City should emphasize the following major issues over the next 1-2 years:
  - Economic Development
  - Police services
  - Maintenance/Beautification of City Streets

# *Major Finding #1*

Residents Have a Very Positive  
Perception of City Services

# Q3. Satisfaction With Items That Influence Perceptions of the City of Las Vegas

by percentage of respondents (excluding don't knows)



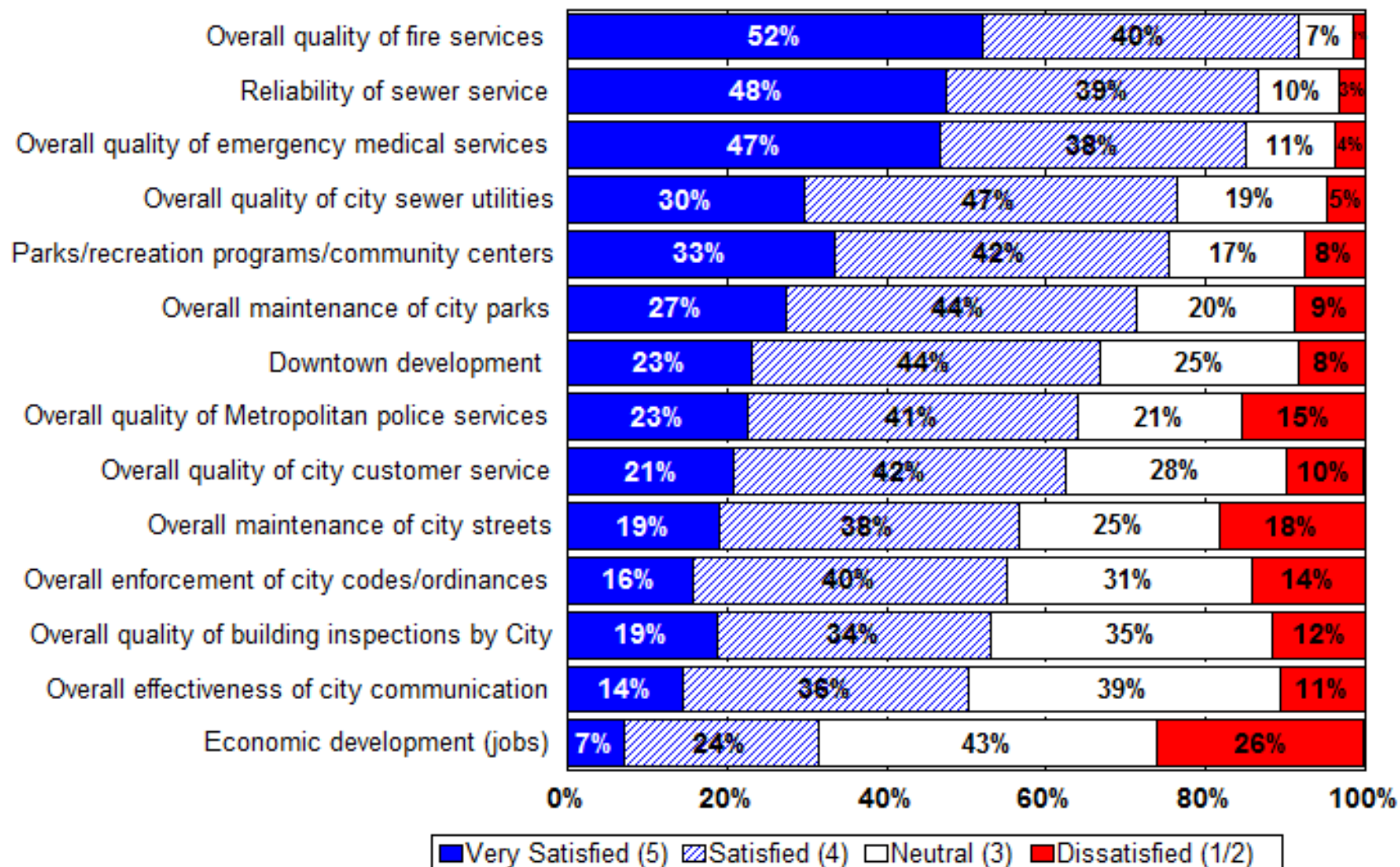
Source: ETC Institute (2014 City of Las Vegas Community Survey)

**The Ratio of Residents Who Were Satisfied with the Overall Quality of City Services vs. Those Who Were Dissatisfied Was More Than 14 to 1 (71% Satisfied vs. 5% Dissatisfied)**



# Q1. Satisfaction With Major Categories of City Services

by percentage of respondents (excluding don't knows)

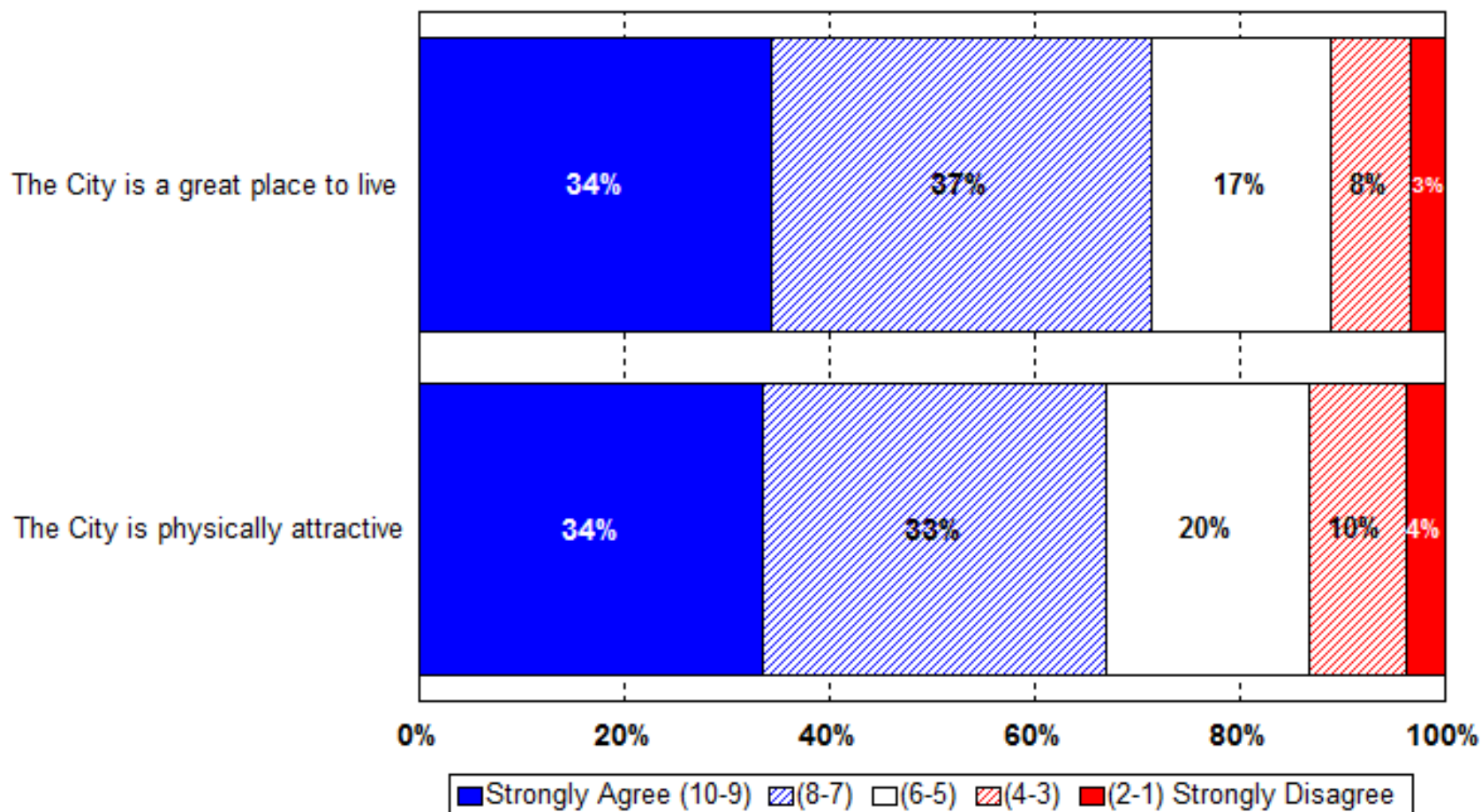


Source: ETC Institute (2014 City of Las Vegas Community Survey)

**Most City Services Received High Ratings**

## Q4. Level of Agreement with Various Statements About the Las Vegas

by percentage of respondents who rated the statement on a 10-point scale, where a rating of 10 meant "strongly agree" and a rating of 1 meant "strongly disagree" (excluding don't knows)

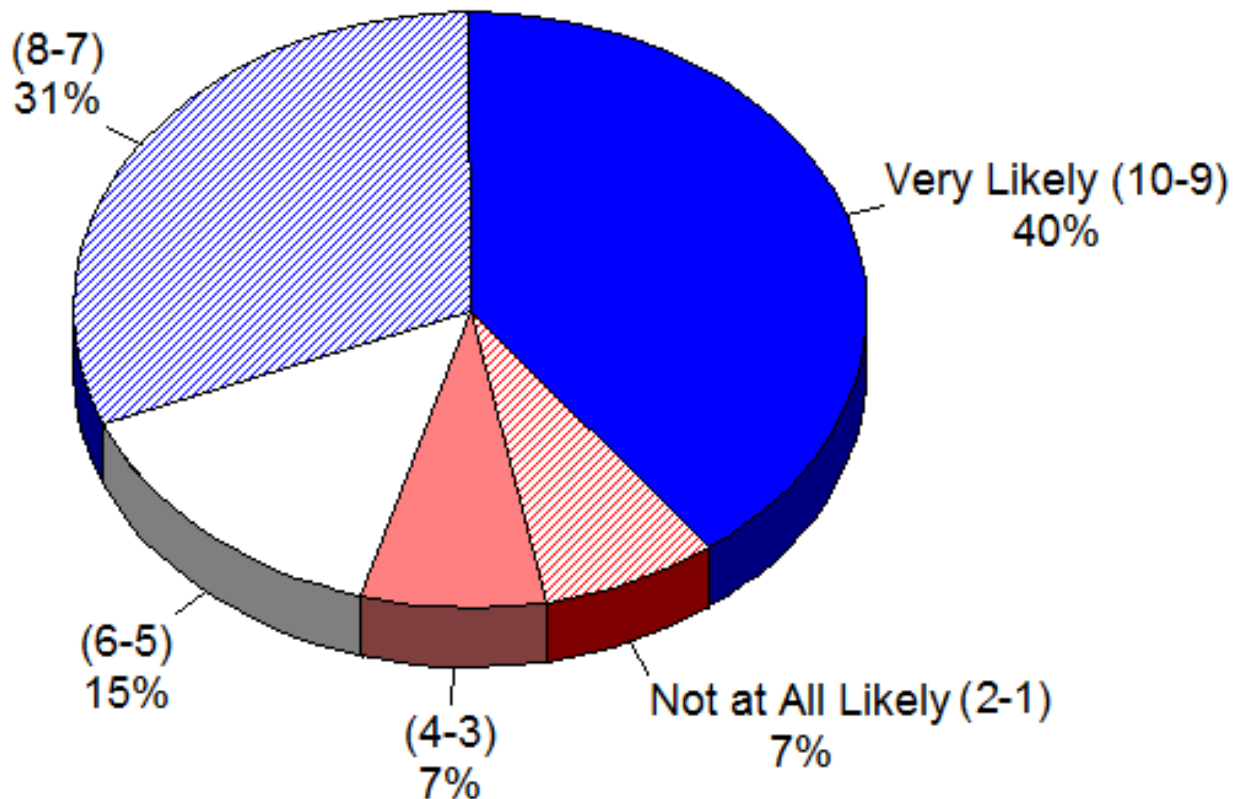


Source: ETC Institute (2014 City of Las Vegas Community Survey)

**Most residents feel good about living in Las Vegas**

## Q5. How likely would you be to recommend the community as a place to live?

by percentage of respondents who rated how likely they would be to recommend their community as a place to live on a 10-point scale, where a rating of 10 meant "very likely" and a rating of 1 meant "not likely at all"



Source: ETC Institute (2014 City of Las Vegas Community Survey)

**Most Residents Would Recommend Las Vegas to Others as a Place to Live**



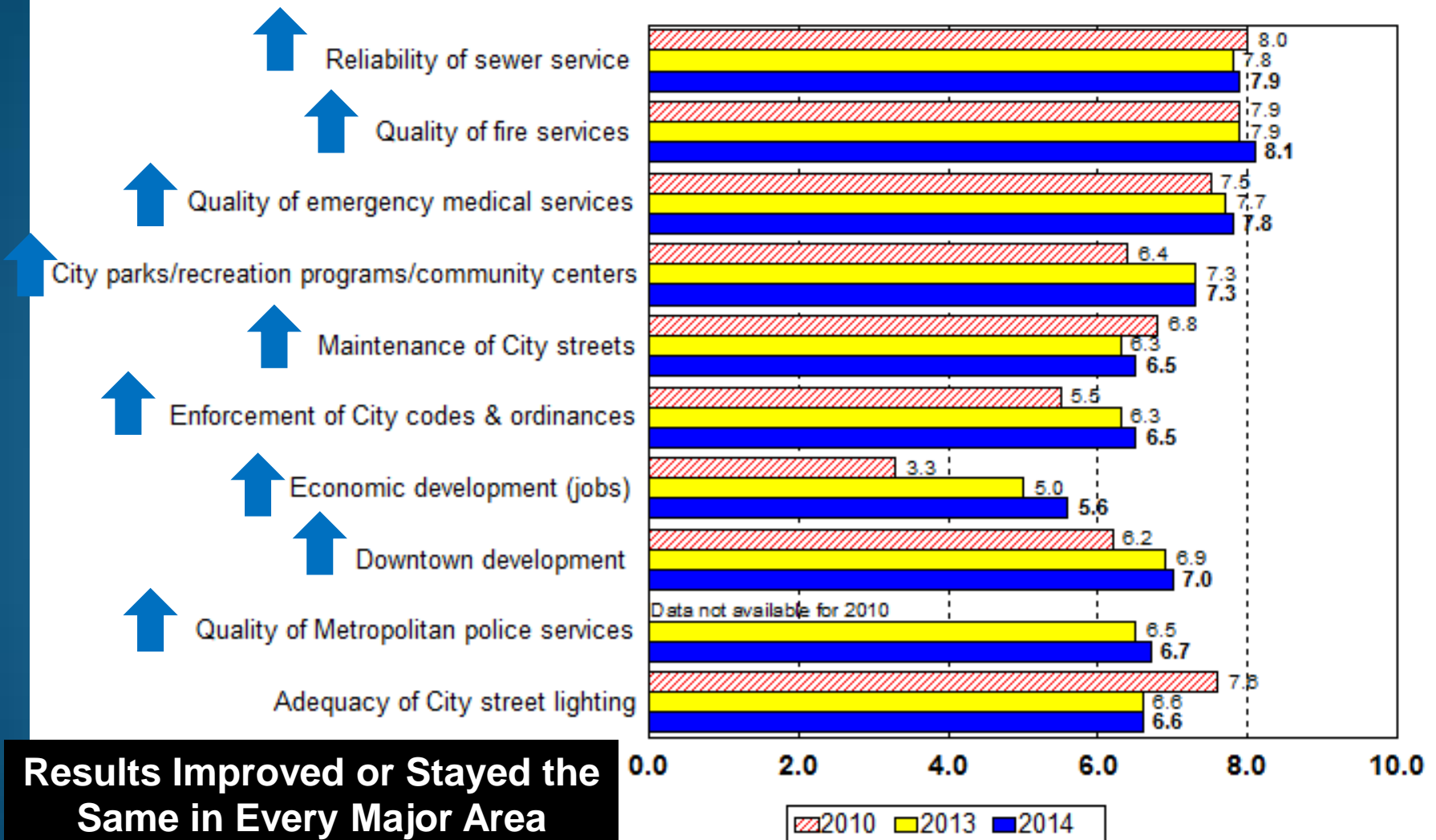
## *Major Finding #2*

The City is Moving in the Right  
Direction

# Satisfaction With Major Categories of City Services

## *Trends: 2010 to 2014*

Mean ratings on a 10-point scale (excluding don't knows)



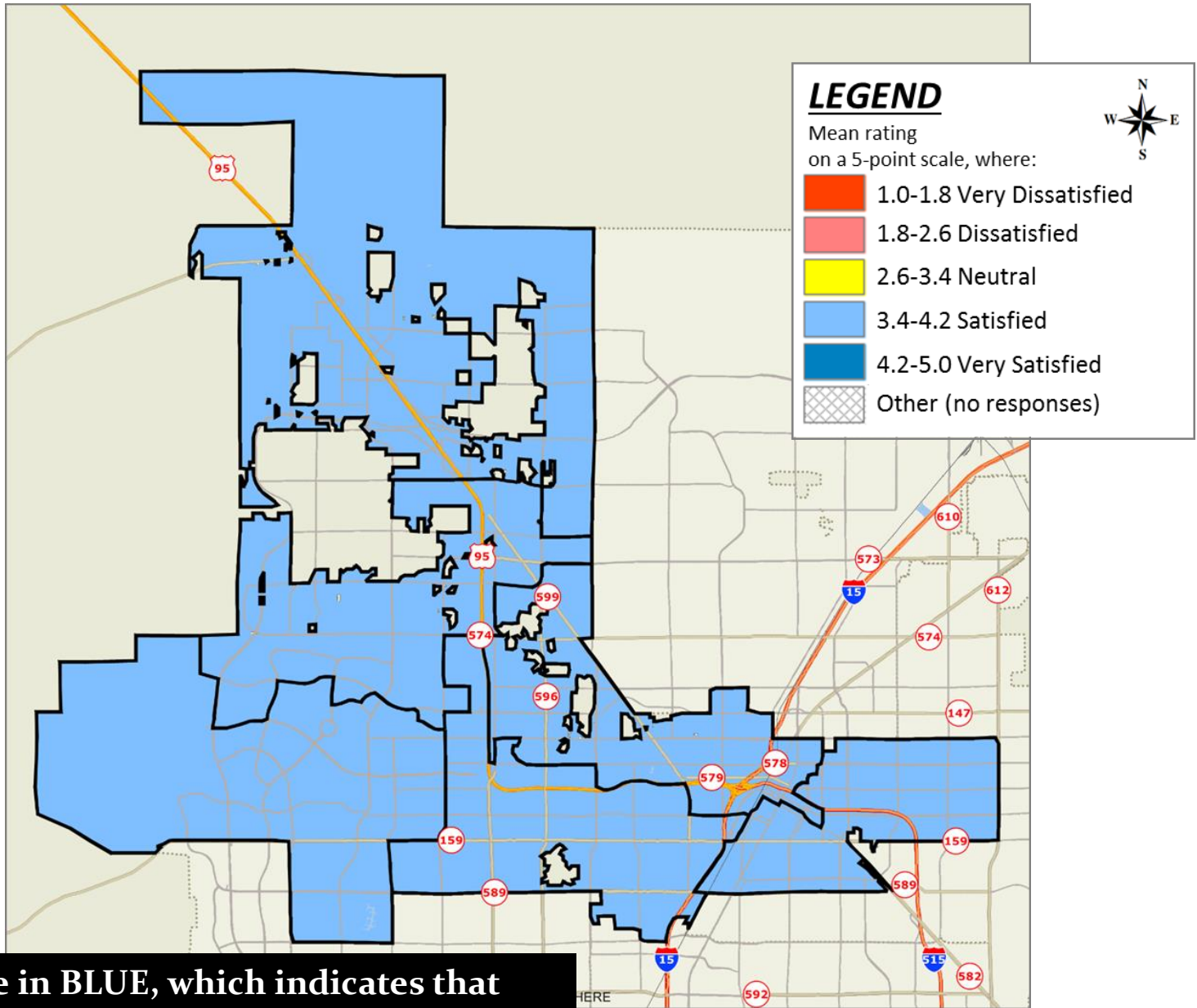
**Results Improved or Stayed the Same in Every Major Area**

Source: ETC Institute (2014 City of Las Vegas Community Survey)

## *Major Finding #3*

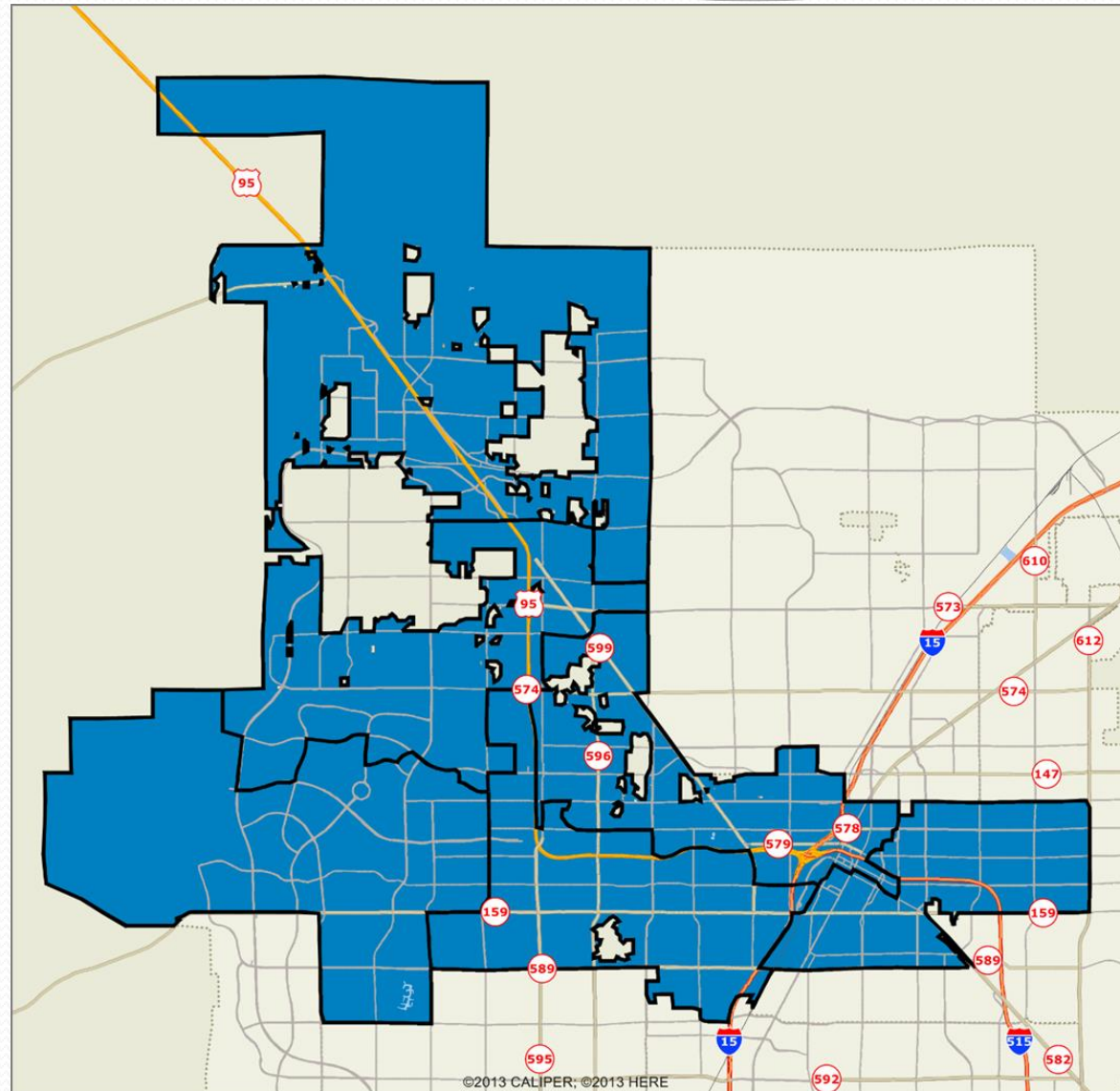
Overall Satisfaction With City  
Services is High in  
Most Areas of the City

# Q3a Satisfaction with the Overall Quality of City Services Provided



All areas are in BLUE, which indicates that residents are satisfied with the overall quality of city services

# FIRE Services Rated High Throughout the City



## LEGEND

Mean rating  
on a 5-point scale, where:

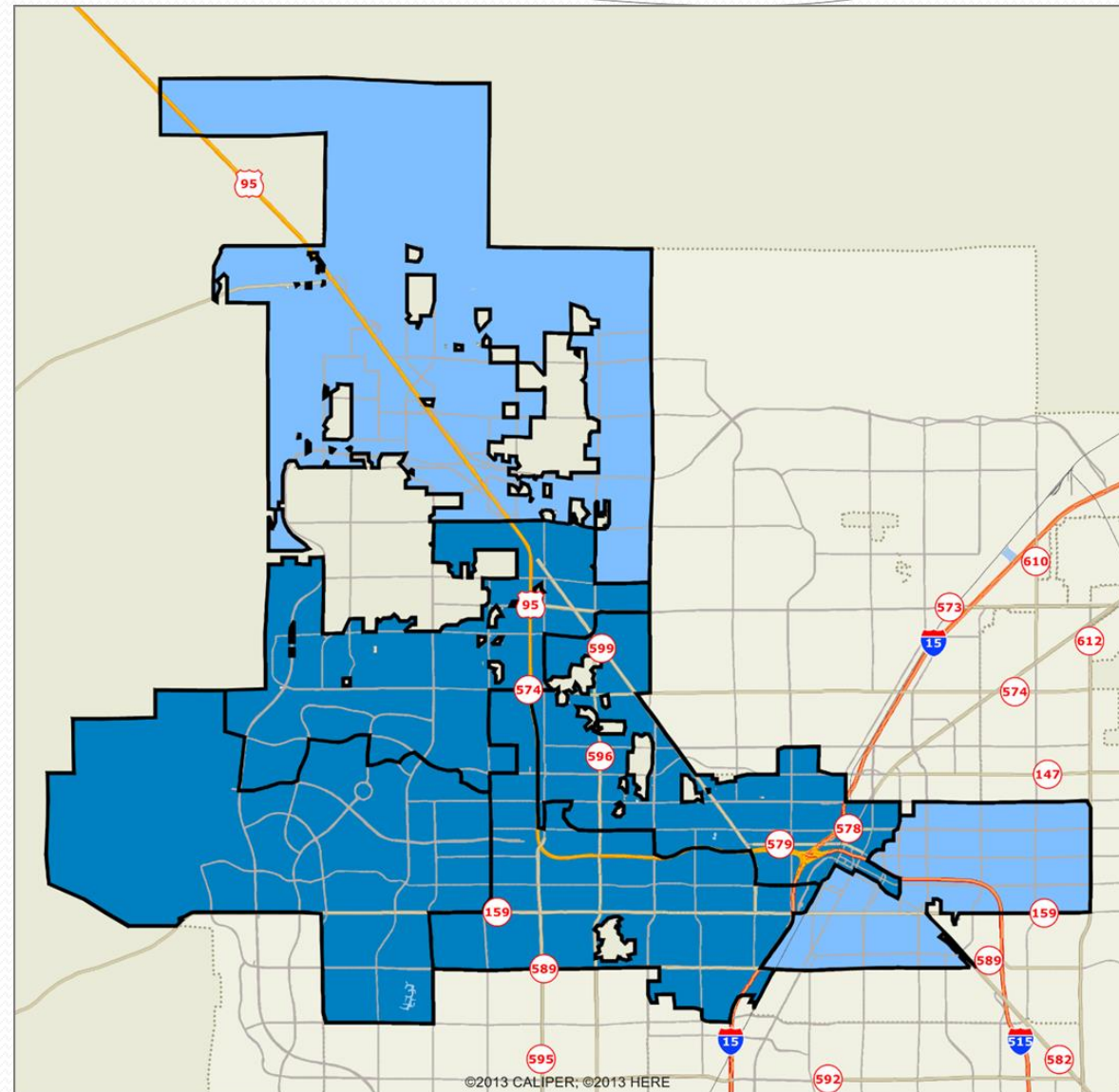
- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)

## 2014 Las Vegas Community Survey

Shading reflects the mean rating for all respondents by Council Ward



# EMERGENCY MEDICAL Services Rated High Throughout the City



## 2014 Las Vegas Community Survey

Shading reflects the mean rating for all respondents by Council Ward

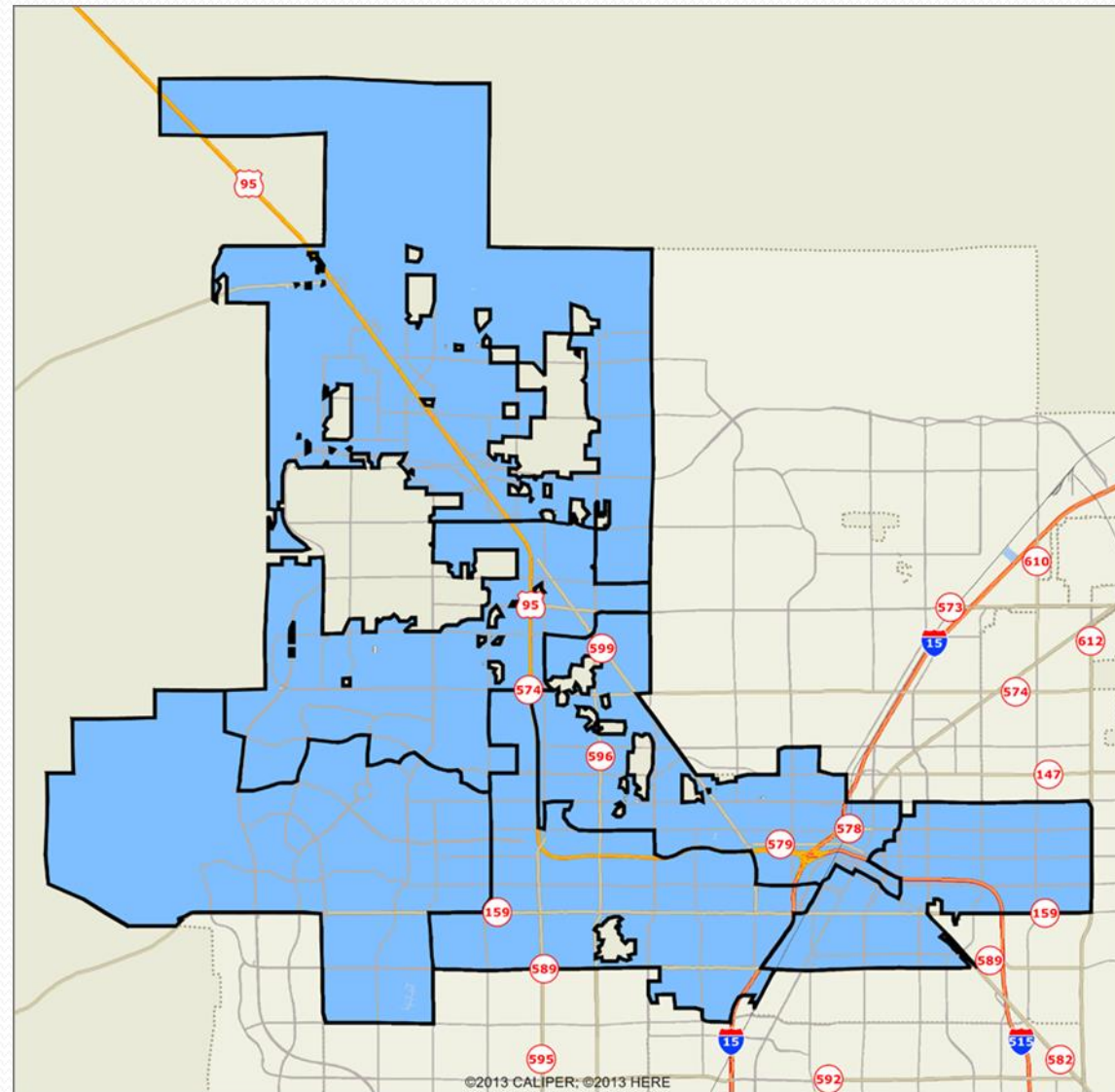
### LEGEND

Mean rating  
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)



# PARKS & RECREATION PROGRAMS Rated High Throughout the City



## LEGEND

Mean rating  
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)

## 2014 Las Vegas Community Survey

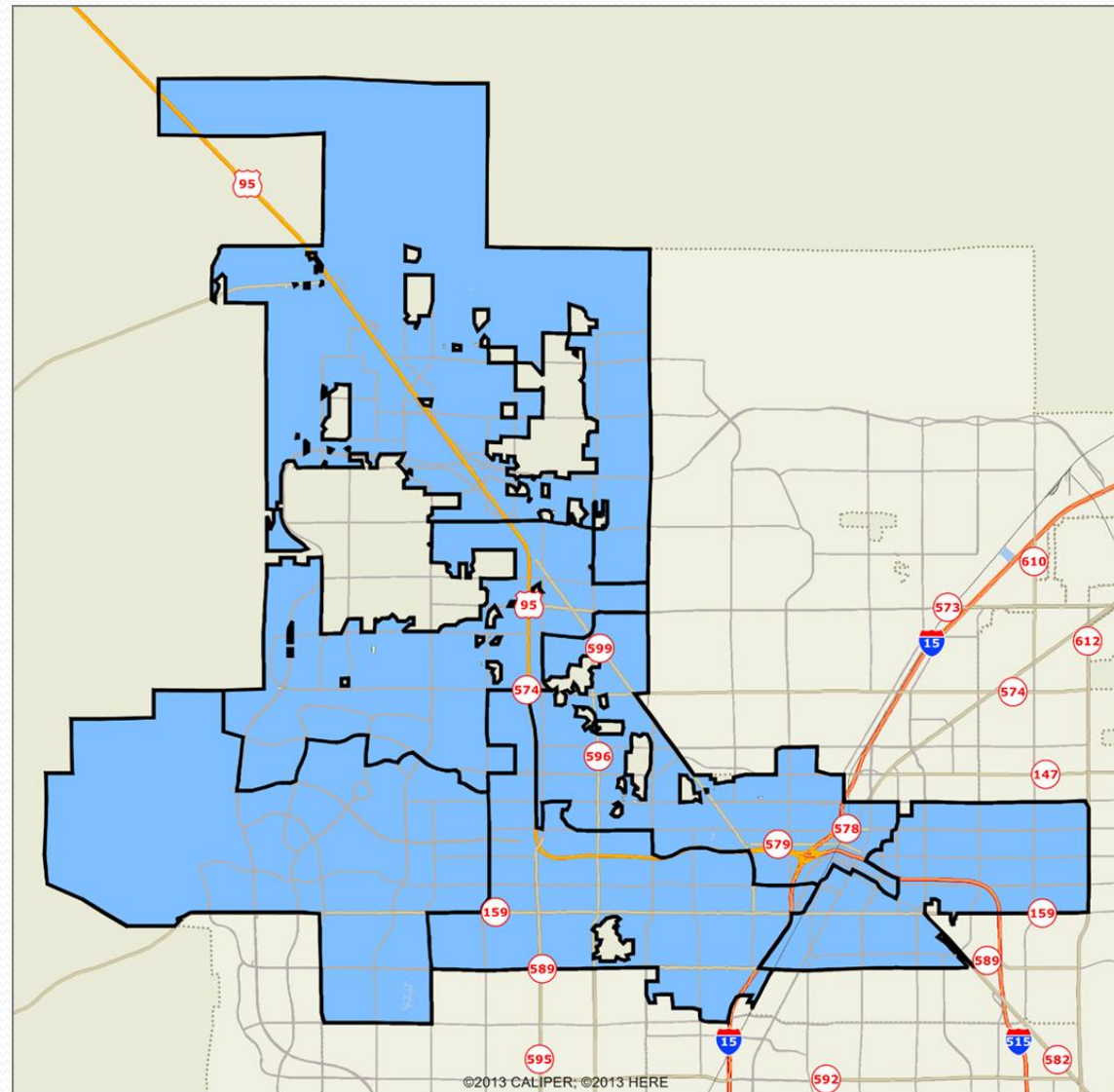
Shading reflects the mean rating for all respondents by Council Ward

# PARK MAINTENANCE Ratings Were High Throughout the City

## LEGEND

Mean rating  
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)



## 2014 Las Vegas Community Survey

Shading reflects the mean rating for all respondents by Council Ward

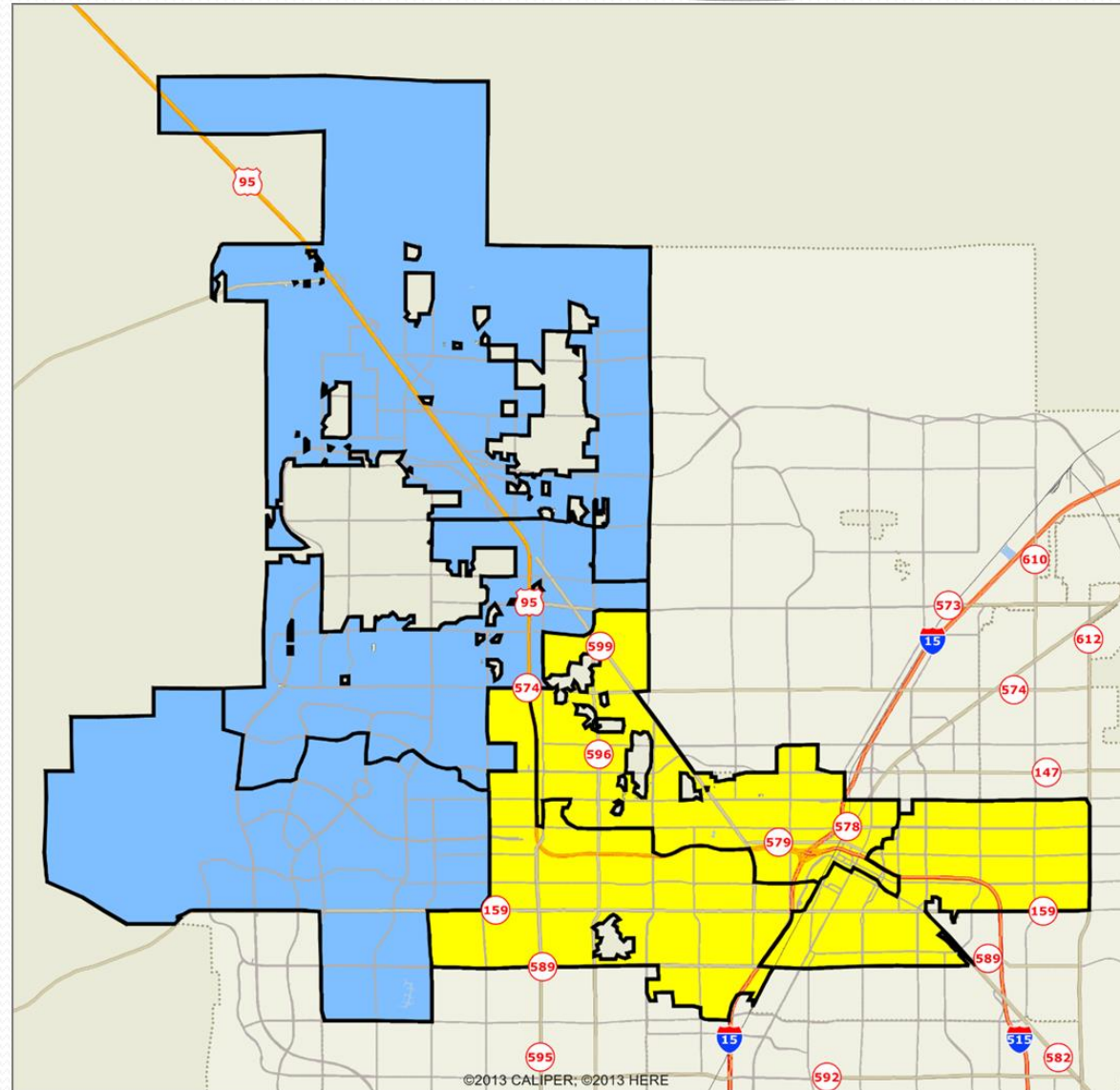


# STREET MAINTENANCE Ratings Varied in Some Areas of the City

## LEGEND

Mean rating  
on a 5-point scale, where:

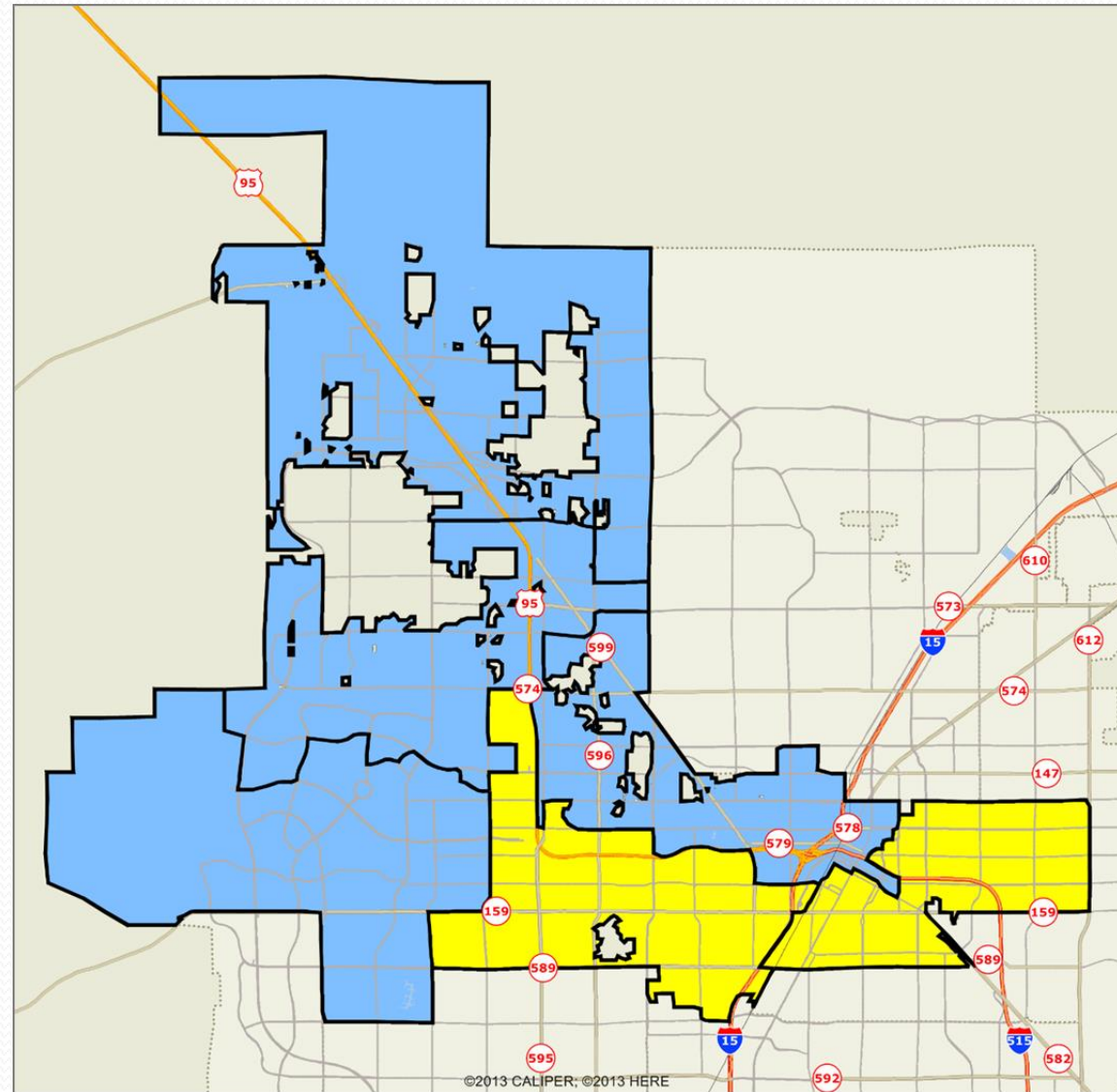
- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)



## 2014 Las Vegas Community Survey

Shading reflects the mean rating for all respondents by Council Ward

# CODE ENFORCEMENT Results Varied in Some Areas



## LEGEND

Mean rating  
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)

## 2014 Las Vegas Community Survey

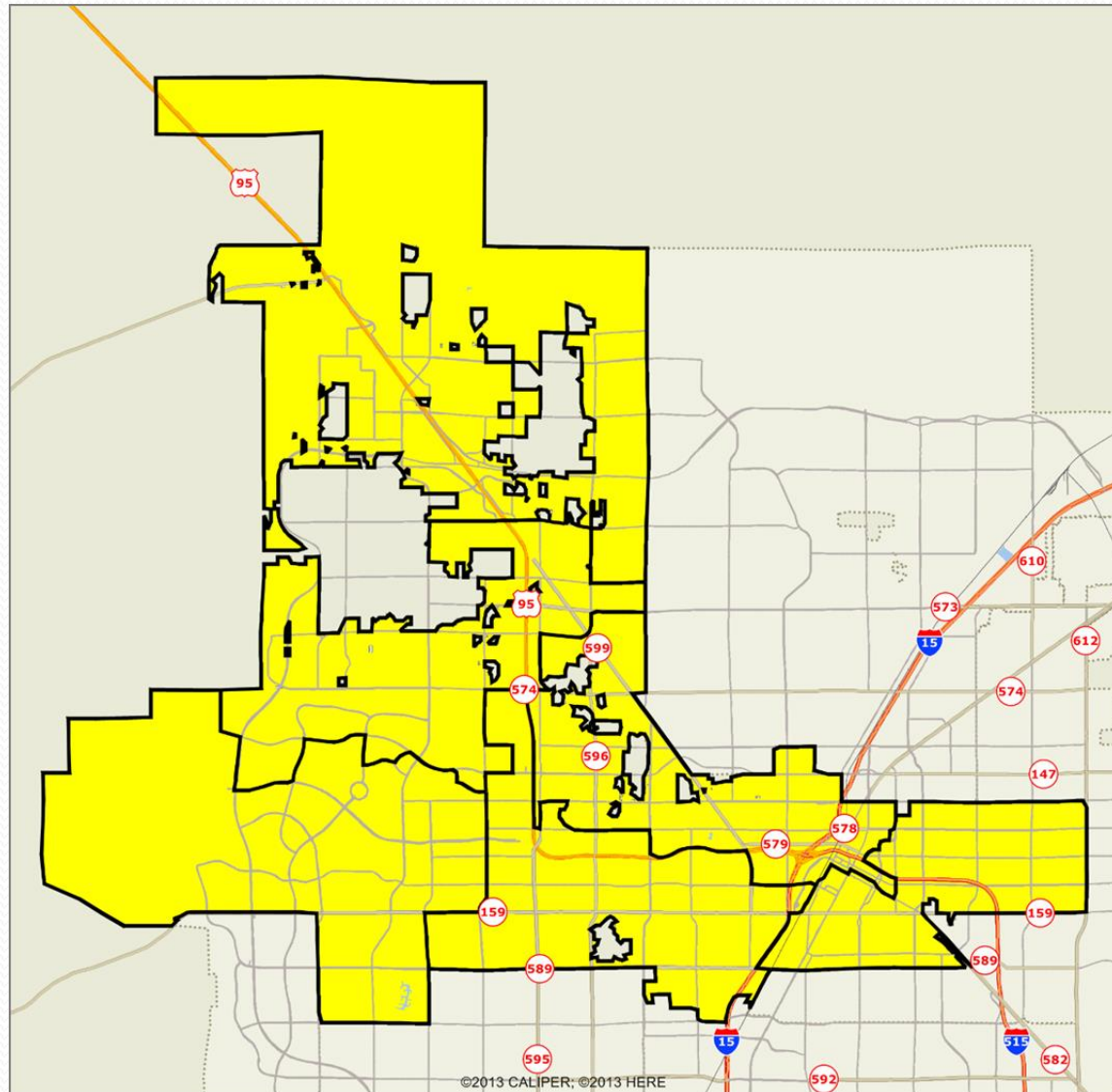
Shading reflects the mean rating for all respondents by Council Ward

# Concerns About Economic Development/Jobs Affected All Parts of the City

## LEGEND

Mean rating  
on a 5-point scale, where:

- 1.0-1.8 Very Dissatisfied
- 1.8-2.6 Dissatisfied
- 2.6-3.4 Neutral
- 3.4-4.2 Satisfied
- 4.2-5.0 Very Satisfied
- Other (no responses)



## 2014 Las Vegas Community Survey

Shading reflects the mean rating for all respondents by Council Ward

## *Major Finding #3*

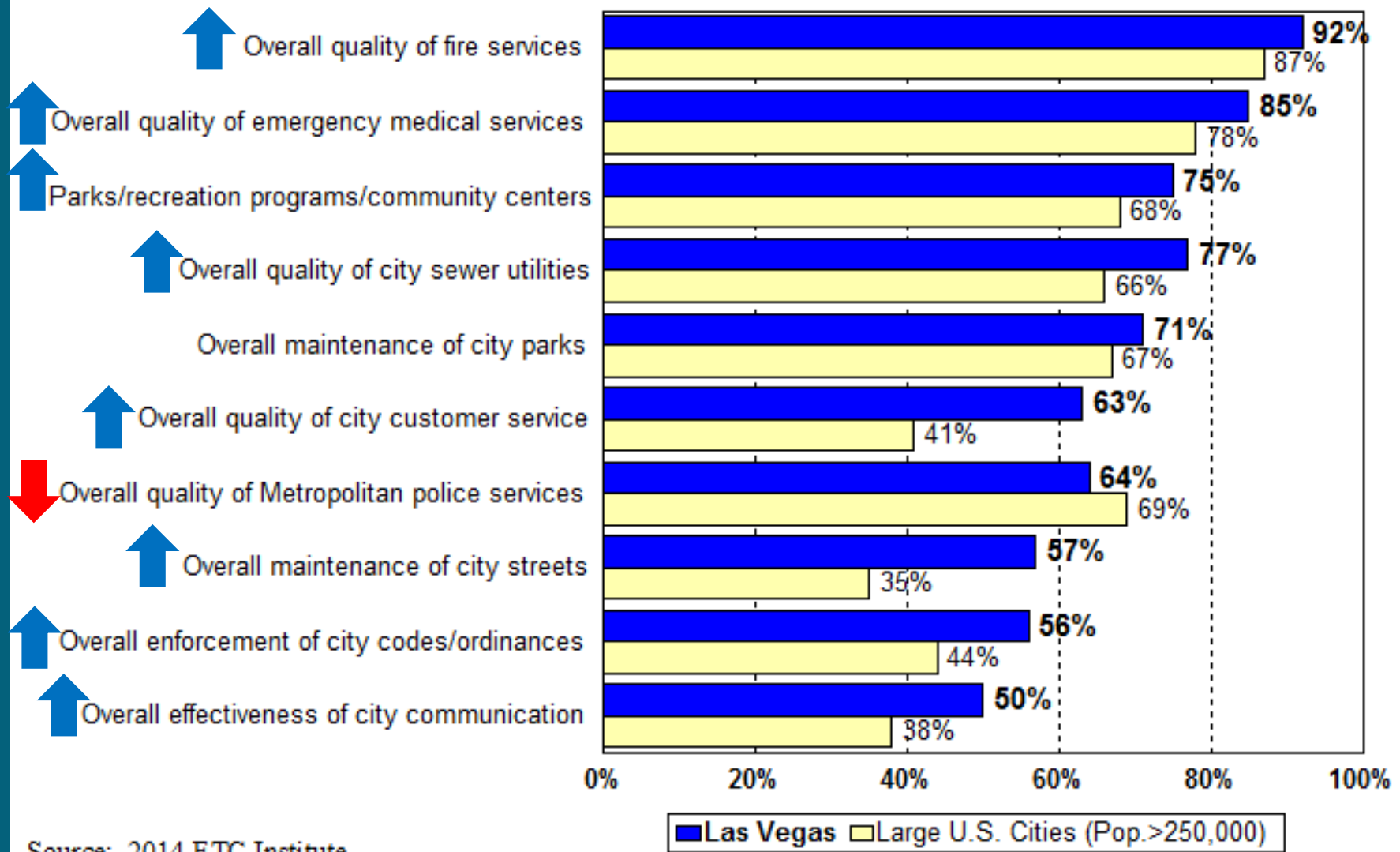
Overall Satisfaction with City Services is Significantly Higher in Las Vegas than Other Large U.S. Cities, but the City is trailing other Cities in some areas that are not directly related to City Services.



# Overall Satisfaction with Major Categories of City Services

## City of Las Vegas vs. Large U.S. Average

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

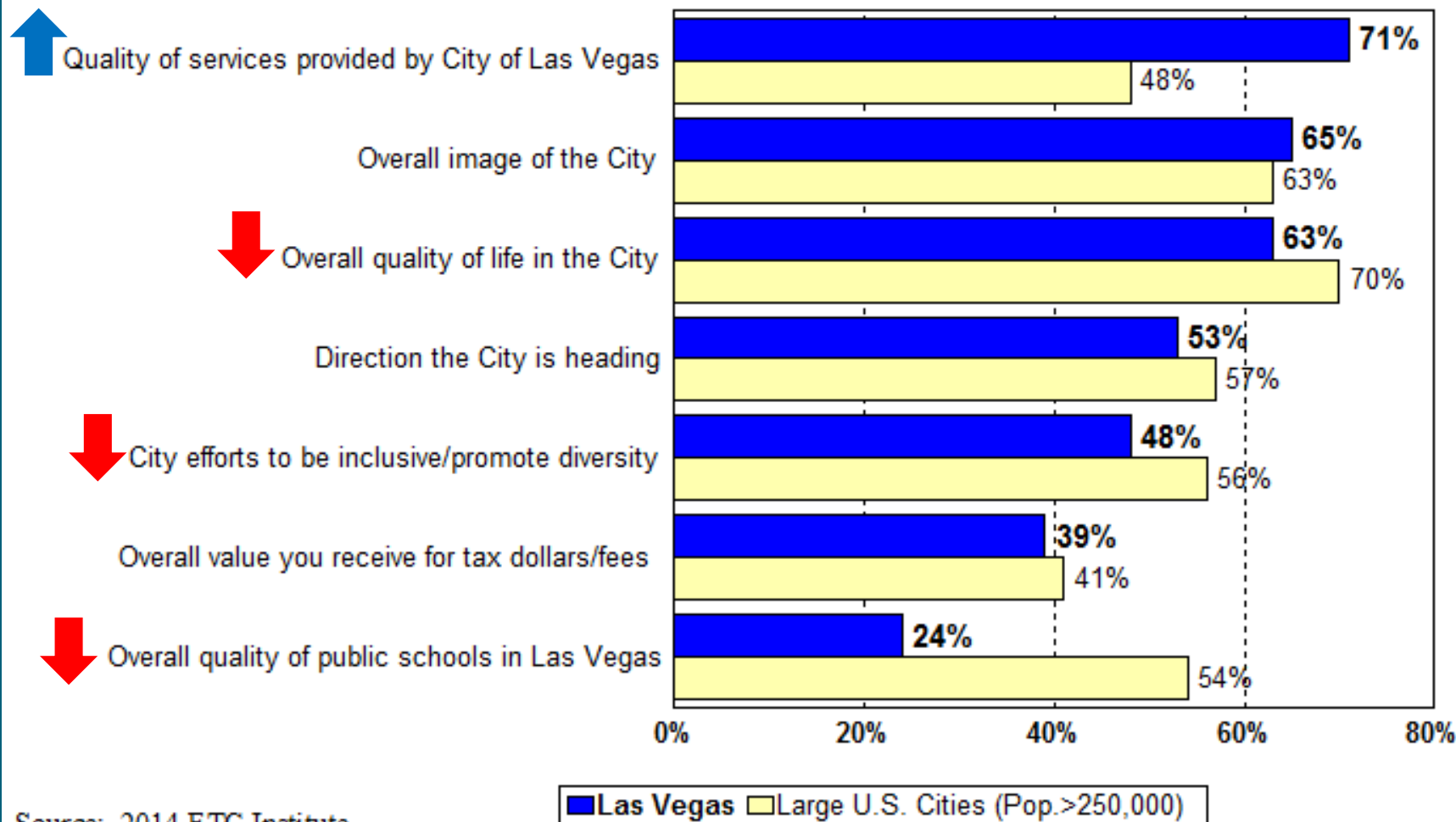


**Las Vegas Is Setting the Standard for Service Delivery in Most Areas**

# Satisfaction with Issues that Influence Perceptions of the City

## City of Las Vegas vs. Large U.S. Average

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



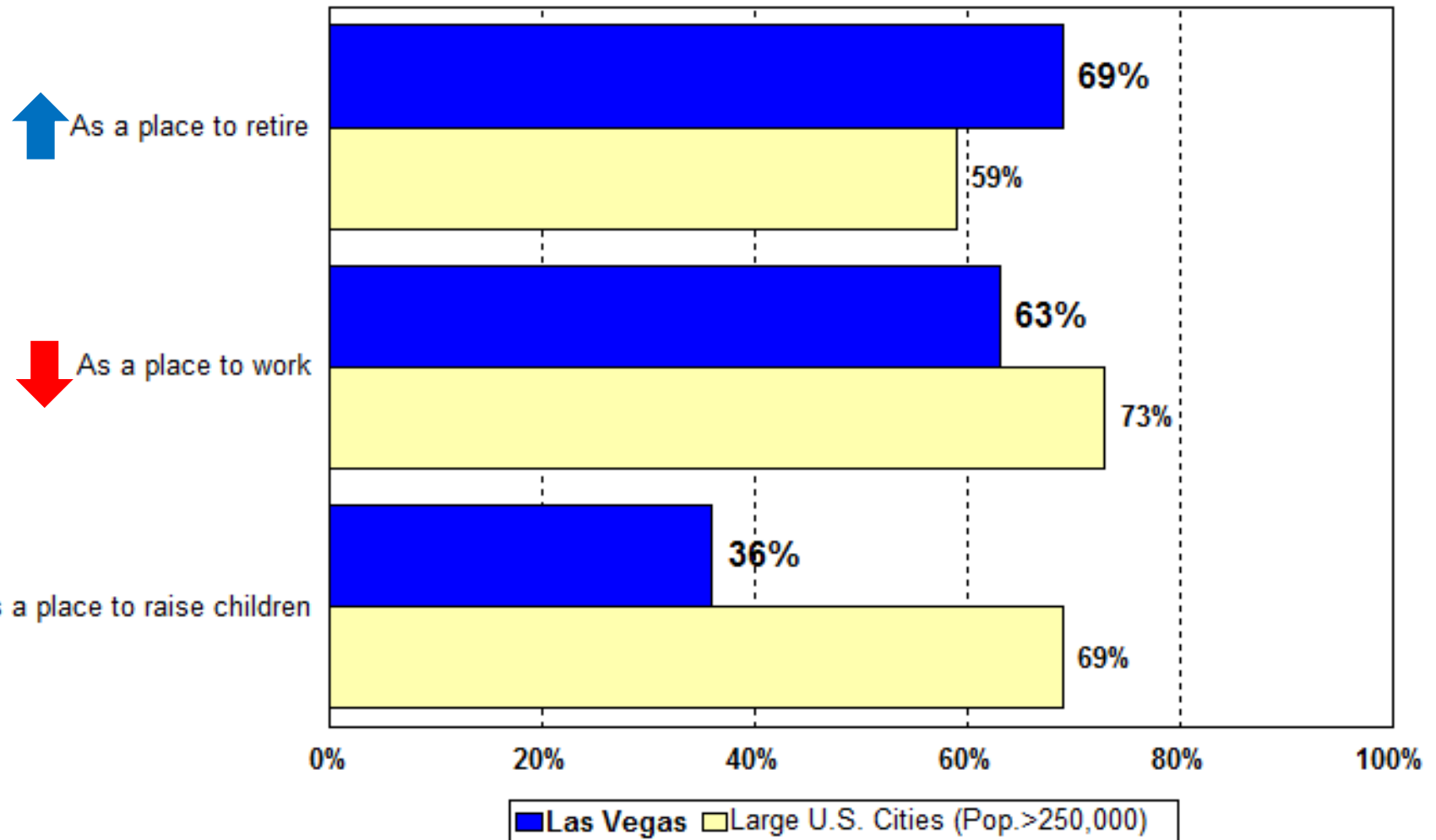
Source: 2014 ETC Institute

Satisfaction With City Services Is 23% Above the US Average, but the City trails in other areas

# Overall Ratings of the City

## City of Las Vegas vs. Large U.S. Average

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "excellent" and 1 was "poor" (excluding don't knows)



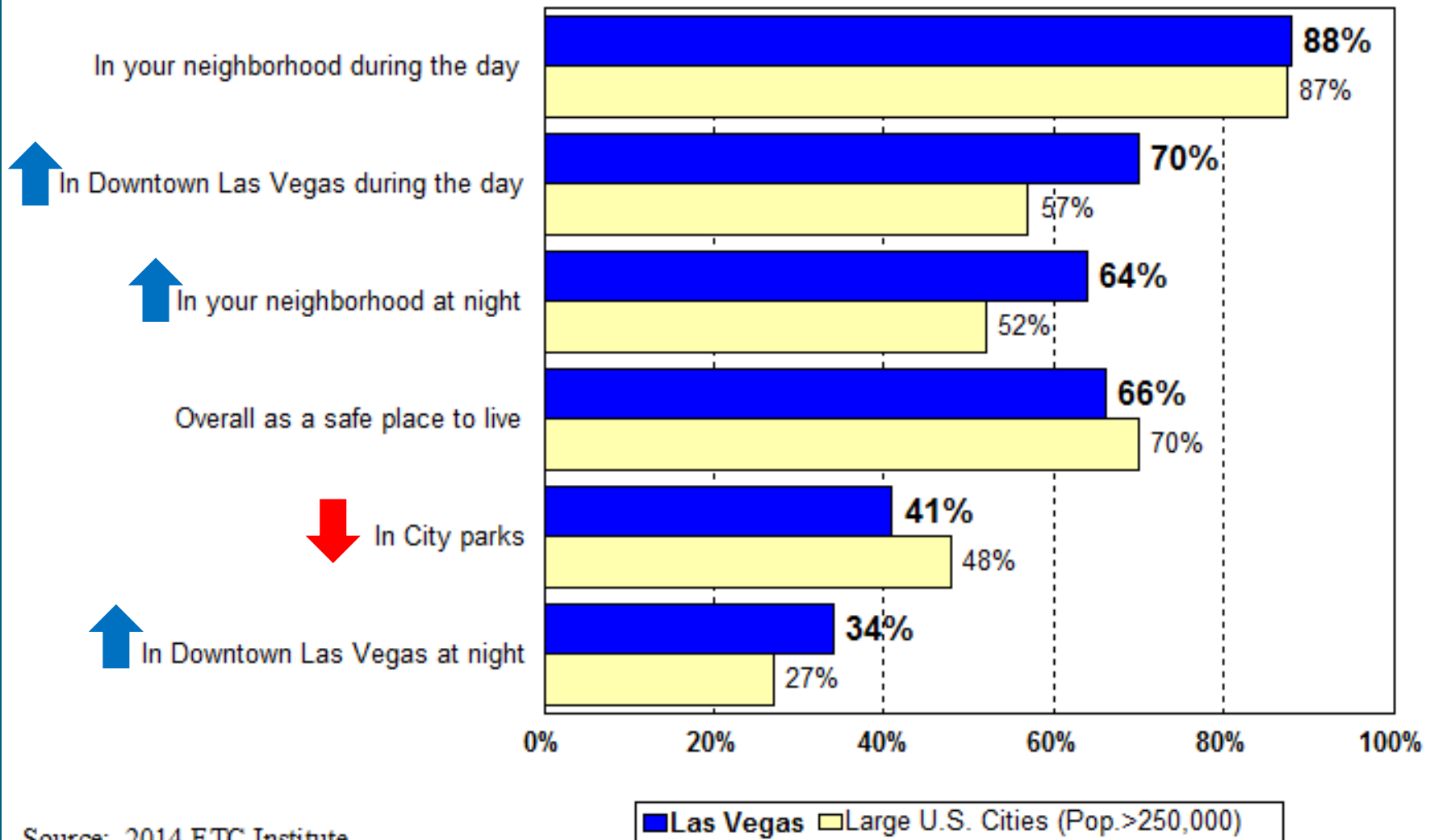
Source: 2014 ETC Institute

City Rates Well As a Place to Retire, but Not as a Place to Raise Children

# How Safe Residents Feel in Their Community

## City of Las Vegas vs. Large U.S. Average

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very safe" and 1 was "very unsafe" (excluding don't knows)



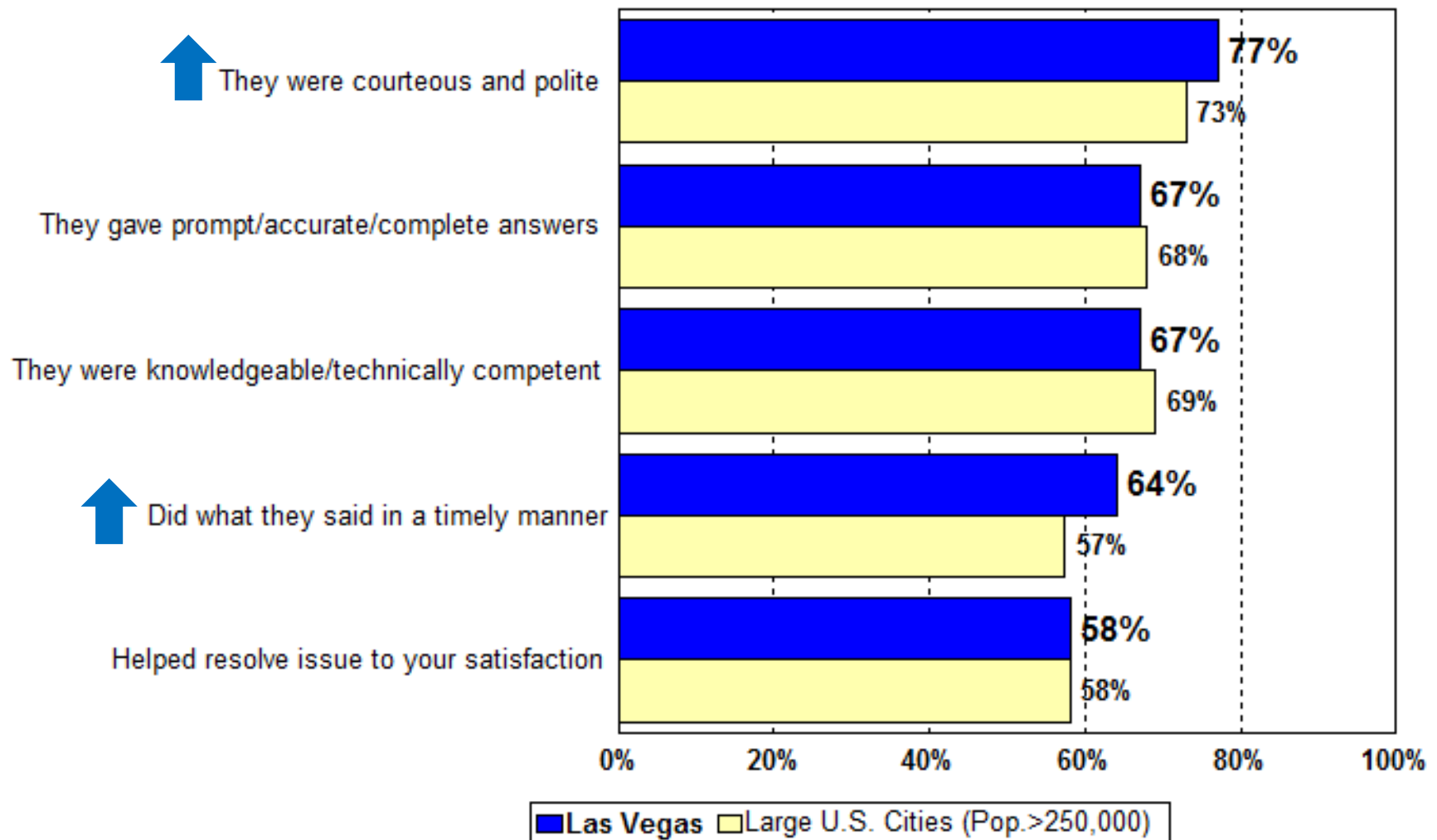
**Residents of Las Vegas Generally Feel Safer than Residents of Other Large U.S. Cities**



# Overall Satisfaction with Customer Service

## City of Las Vegas vs. Large U.S. Average

by percentage of respondents who rated the item 4 or 5 on a 5-point scale  
where 5 was "always" and 1 was "never" (excluding don't knows)



Source: 2014 ETC Institute

## **Major Finding #4**

To enhance overall satisfaction with City government, the City should emphasize economic development, police services and street maintenance over the next 1-2 years

# Importance-Satisfaction Rating

## 2014 Las Vegas Community Survey

### MAJOR CATEGORIES OF CITY SERVICES

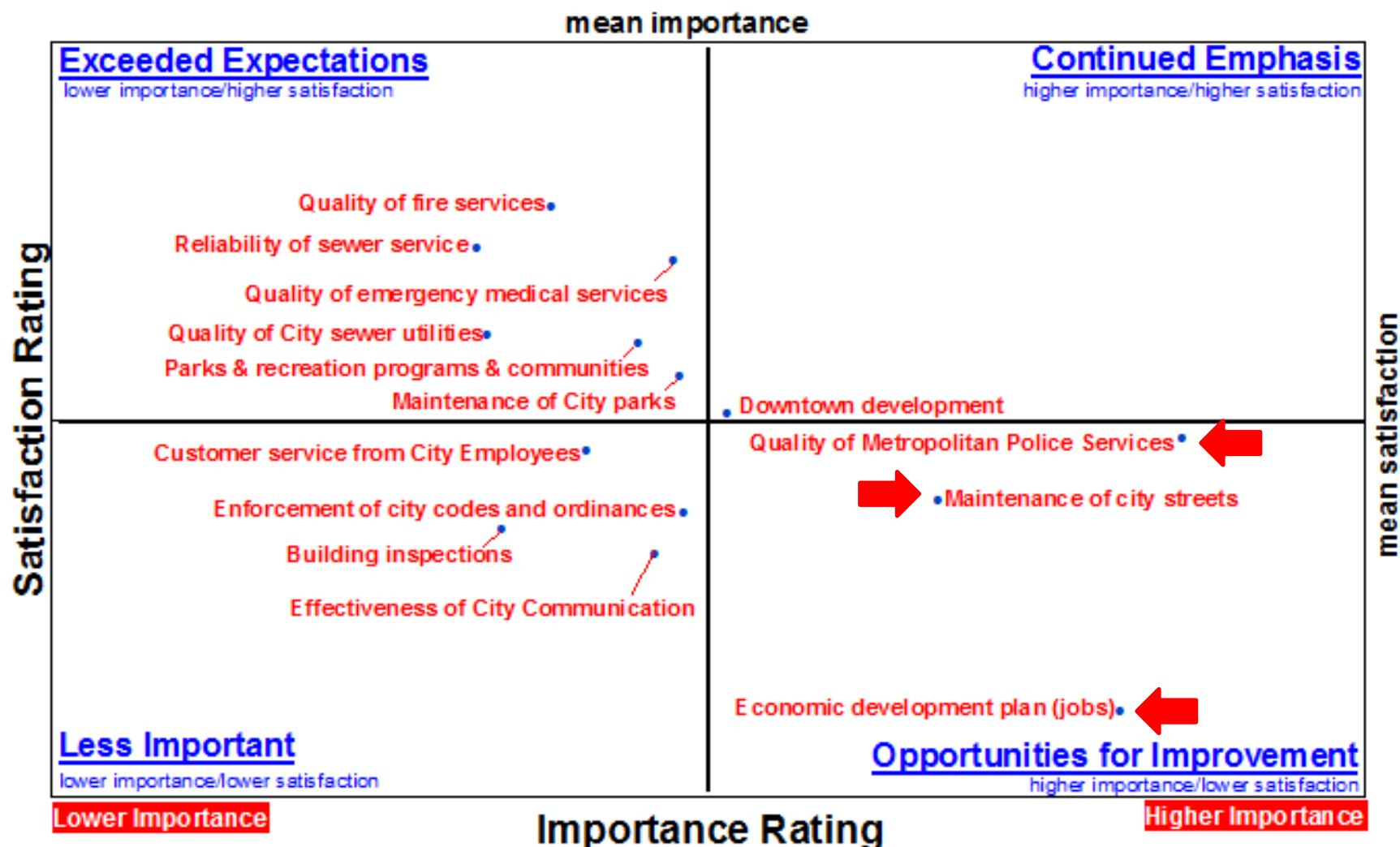
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt; .20)</u></b>						
Economic development (jobs)	51%	2	31%	14	0.3512	1
<b><u>High Priority (IS .10-.20)</u></b>						
Overall quality of Metropolitan police services	55%	1	64%	8	0.1989	2
Overall maintenance of city streets	39%	3	57%	10	0.1680	3
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Overall effectiveness of city communication	19%	8	50%	13	0.0959	4
Overall enforcement of city codes/ordinances	21%	5	55%	11	0.0950	5
Downtown development	24%	4	67%	7	0.0801	6
Overall maintenance of city parks	21%	6	71%	6	0.0603	7
Overall quality of city customer service	15%	10	63%	9	0.0548	8
Parks/recreation programs/community centers	18%	9	75%	5	0.0445	9
Overall quality of building inspections by City	9%	12	53%	12	0.0408	10
Overall quality of emergency medical services	21%	7	85%	3	0.0305	11
Overall quality of city sewer utilities	8%	13	76%	4	0.0184	12
Overall quality of fire services	12%	11	92%	1	0.0102	13
Reliability of sewer service	7%	14	87%	2	0.0094	14

**Overall Priorities:** 

# 2014 City of Las Vegas DirectionFinder Importance-Satisfaction Assessment Matrix

## -Major Categories of City Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



# Importance-Satisfaction Rating

## 2014 Las Vegas Community Survey

### MAINTENANCE SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt; .20)</u></b>						
Cleanliness of city streets/other public areas	57%	1	57%	9	0.2432	1
<b><u>High Priority (IS .10-.20)</u></b>						
Adequacy of city street lighting	44%	2	63%	5	0.1638	2
Maintenance of curbs/gutters on city streets	38%	4	58%	8	0.1604	3
Maintenance of sidewalks in Las Vegas	33%	6	61%	7	0.1270	4
Maintenance of traffic signals and street signs	38%	3	70%	3	0.1138	5
Maintenance/preservation of downtown Las Vegas	29%	7	63%	6	0.1076	6
<b><u>Medium Priority (IS &lt; .10)</u></b>						
Maintenance of streets in YOUR neighborhood	35%	5	73%	2	0.0918	7
Quality of landscaping along City streets	27%	8	68%	4	0.0860	8
Maintenance of city buildings	18%	9	74%	1	0.0466	9

**City Maintenance Priorities:**

# Importance-Satisfaction Rating

## 2014 Las Vegas Community Survey

### PUBLIC SAFETY SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt; .20)</u></b>						
The City's efforts to prevent crime	52%	1	46%	10	0.2796	1
The visibility of police in neighborhoods	49%	2	44%	12	0.2743	2
<b><u>High Priority (IS .10-.20)</u></b>						
Enforcement of local traffic laws	31%	3	44%	11	0.1738	3
Overall quality of local police protection	30%	4	54%	4	0.1394	4
How quickly police respond to emergencies	26%	5	48%	8	0.1373	5
The visibility of police in commercial areas	26%	6	47%	9	0.1360	6
Law enforcement in City parks/facilities	21%	7	42%	13	0.1222	7
<b><u>Medium Priority (IS &lt; .10)</u></b>						
Quality of animal control	16%	9	51%	5	0.0781	8
Municipal courts	13%	11	49%	7	0.0671	9
Emergency medical services	17%	8	72%	3	0.0470	10
City Jail (Misdemeanor Detention Center)	7%	13	41%	14	0.0409	11
Fire/medical personnel response to emergencies	15%	10	82%	1	0.0280	12
Fire prevention inspections	5%	14	50%	6	0.0235	13
Firefighting services	8%	12	79%	2	0.0164	14

**Public Safety Priorities:** 



# Importance-Satisfaction Rating

## 2014 Las Vegas Community Survey

### COMMUNITY DEVELOPMENT AND BEAUTIFICATION SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>Very High Priority (IS &gt; .20)</b>						
Enforcing clean-up/removal of junk & debris	51%	1	41%	11	0.3027	1
Graffiti removal	48%	2	48%	3	0.2516	2
Downtown parking access and information	34%	5	37%	12	0.2151	3
Neighborhood clean-ups sponsored by the City	36%	4	43%	10	0.2041	4
<b>High Priority (IS .10-.20)</b>						
Exterior maintenance of residential property	36%	3	45%	9	0.1996	5
Exterior maintenance of business property	25%	6	47%	4	0.1307	6
<b>Medium Priority (IS &lt;.10)</b>						
Enforcing sign regulations	17%	7	46%	7	0.0922	7
Enforcing parking regulations	16%	8	49%	2	0.0791	8
Zoning services	8%	9	47%	6	0.0405	9
Building inspections	7%	10	46%	8	0.0386	10
Business licensing	6%	11	53%	1	0.0298	11
Building permits	5%	12	47%	5	0.0265	12

**Development and Beautification Priorities:**

# Importance-Satisfaction Rating

## 2014 Las Vegas Community Survey

### PARKS, RECREATION, CULTURAL, AND COMMUNITY SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very High Priority (IS &gt; .20)</u></b>						
Homeless services	40%	1	23%	17	0.3099	1
<b><u>High Priority (IS .10-.20)</u></b>						
Senior citizens programs and centers	31%	2	54%	4	0.1426	2
City's youth programs	25%	3	45%	11	0.1375	3
Before- and After-School programs	22%	5	48%	9	0.1147	4
<b><u>Medium Priority (IS &lt; .10)</u></b>						
Walking and biking trails in the City	24%	4	59%	3	0.0974	5
Youth Camps	14%	9	36%	16	0.0919	6
Arts, culture and special events programs	18%	7	53%	6	0.0848	7
City community centers and programs	16%	8	53%	7	0.0760	8
Fees charged for recreation programs	9%	11	45%	13	0.0494	9
Number of city parks	19%	6	74%	1	0.0485	10
Maintenance of sports fields	13%	10	66%	2	0.0450	11
City swimming pools	7%	12	53%	5	0.0328	12
Fees charged for cultural programs	5%	15	36%	15	0.0325	13
Ease of registering for programs	6%	13	49%	8	0.0304	14
Water safety classes	5%	14	46%	10	0.0280	15
Facility and Park Rentals	4%	16	45%	12	0.0222	16
Aquatic Programs	4%	17	39%	14	0.0220	17

**Parks, Recreation, Cultural and Community Service Priorities:**



# “Very High” Priorities

In Descending Order by I-S Rating

- Economic Development
- Homeless Services
- Clean-up of Junk and Debris
- Efforts to Prevent Crime
- Visibility of Police in Neighborhoods
- Graffiti Removal
- Cleanliness of Streets and Public Areas
- Downtown Parking Access & Information
- Neighborhood Cleanups

# *Summary*

# Summary and Conclusions

- Residents have a very positive perception of City Services
- The City is moving in the right direction
  - ✓ Satisfaction with city services improved or stayed the same in all major areas that were assessed
- Overall satisfaction with City services is high in most areas of the City
- Compared to other large cities, Las Vegas is setting the standard for service delivery in most areas
- To enhance overall satisfaction with City government, the City should emphasize the following major issues over the next 1-2 years:
  - Economic Development
  - Police services
  - Maintenance/Beautification of City Streets
- Other “very high” priorities based on the I-S Analysis:
  - Maintenance: Cleanliness of Streets and Public Areas
  - Public Safety: Efforts to Prevent Crime and Visibility of Police in Neighborhoods
  - Community Development & Beautification: Clean-up of Junk and Debris, Graffiti Removal, Downtown Parking Access & Information, and Neighborhood Cleanups
  - Parks, Recreation, Cultural, and Community Services: Homeless Services

# Questions?

## THANK YOU!!